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1988 PACIFIC PACKERS REPORT

CATFISH UPDATE • SEAFOOD CARPACCIO

MARCH/APRIL 1988
VOLUME 7, NUMBER 2

Seafood Business

THE MAGAZINE OF SEAFOOD MARKETING AND MANAGEMENT

ANNUAL SUPERMARKET SURVEY

Seafood Business
MARCH/APRIL 1988 • VOLUME 7, NUMBER 2

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COVER: *Seafood manager Meg Lou shows off a rockfish from the seafood display at Larry's Markets in Seattle. Our Focus on Retail begins on page 34 with the Supermarket Survey.* Photograph by DOUG WILSON.

FROM THE PUBLISHER

We need the NFI — and it needs us

The shows are over, and it's time to start planning for the National Fisheries Institute convention. In this convention issue, we take an in-depth look at the NFI and at Lee Weddig, the man at the controls. You'll find the story on page 77.

Our association is facing troubled times — membership has dropped 10 percent in the past year. Not because NFI isn't doing an excellent job of representing the seafood business — but because we are fortunate not to be faced with crises that demand a centralized management. It's ironic but true of most associations that when business is good, loyalty drops. When panic hits, people rally round.

It's easy to stand back and point to weak points in NFI policy, implementation, and relations. But keep this in mind: representing an industry whose product is imported, exported, farmed, hunted, traded, fresh, frozen, canned, salted, and subject to the vagaries of nature and politics is no easy task. When pressure comes from a lot of directions all at once, pleasing everyone is impossible.

It's important for the industry, both buyers and suppliers, to understand that life without the NFI is not an option. Who would represent us in legislative issues that affect supply, or focus seafood's marketing efforts cohesively, or be the voice that responds to increasing media interest and investigation? The last thing the seafood industry needs is representation by factions.

If you are a critic of the association, come to the convention and make your views known in public. If you are a supporter, make sure that your company is represented by people coming up in the ranks, people who haven't yet experienced one of those crises that can galvanize an industry and strengthen its association. There's a place for them on committees that determine NFI policy.

There are plenty of issues to discuss these days. We have the NFI to thank for keeping them under control. See you in New York.

Nancy Hasselback

P.S. It's time to think about submitting an entry in our annual Marketing Excellence Awards. Find out how on page 85.

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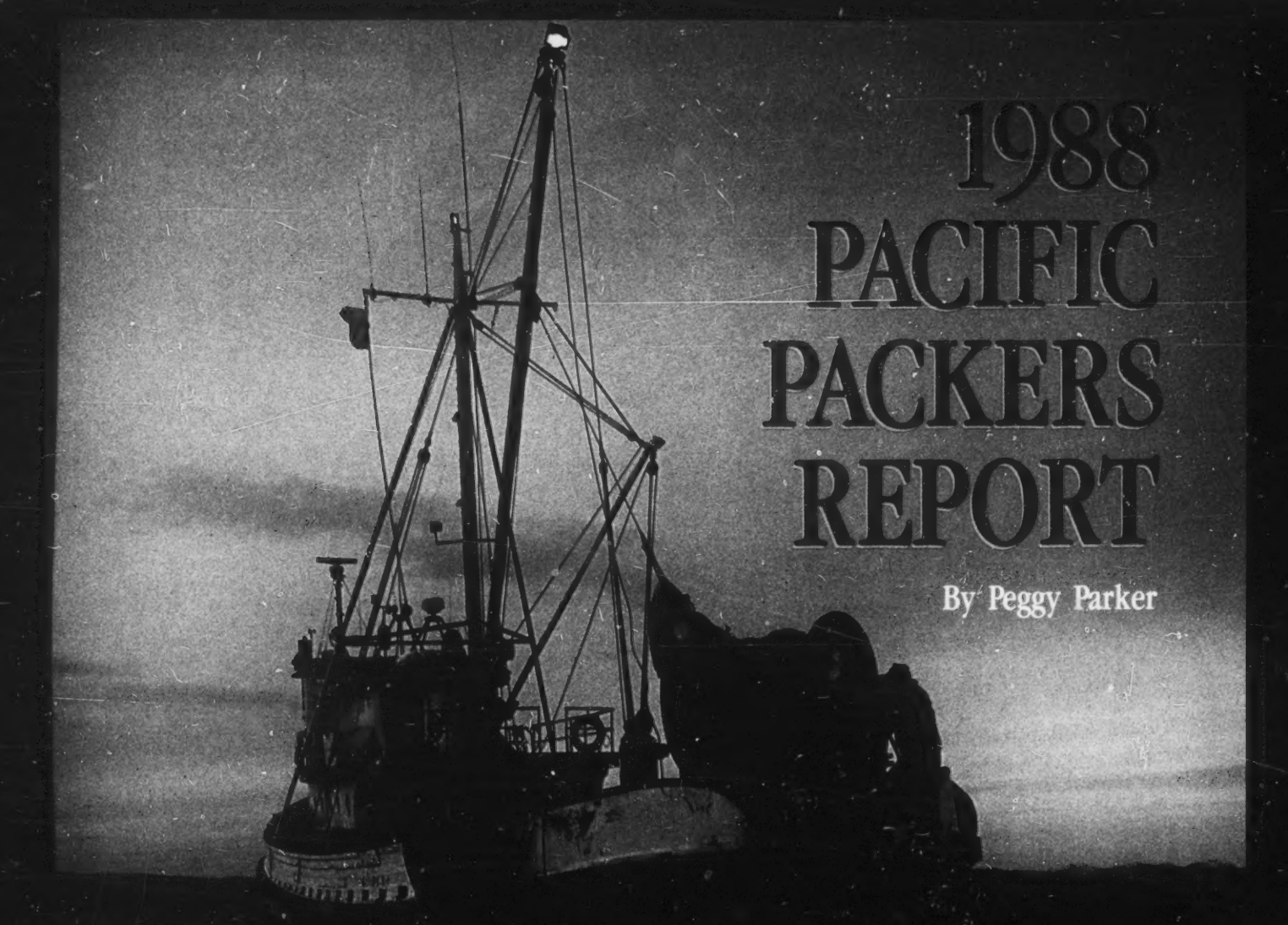


1988 PACIFIC PACKERS REPORT

By Peggy Parker

In its 50th year, *Pacific Packers Report* celebrates the West Coast harvesting, processing and marketing industries. America's growing appetite for seafood has put an emphasis on supply — and that emphasis has directed the country's attention to the West Coast, where supplies are abundant.

In 1987, red salmon, tanner crab, and halibut were landed in record numbers. King crab stocks are on the rebound. Bering Sea groundfish productivity is strong. Shrimp hauls off Oregon were the best since 1978. And the sardines have returned to California, where a canned pack was put up for the first time in decades.

The Pacific salmon farming business, in its infancy now, is growing rapidly. Major improvements in seafood processing and distribution have eased the burden on both suppliers and buyers to move massive quantities of seafood. In the following pages we'll look at the numbers and the players that make this region the country's major supply depot for seafood.

BRUCE MAXSON

A mixed catch of Alaska bottomfish. 1988 quotas for cod and pollock are more than double last year's.

BRAD MATSEN

Americans Take Over the Zone

It's almost like a battlefield, the U.S. exclusive economic zone (EEZ) off Alaska, with the North Pacific Fisheries Management Council acting as the arbitrator among warring factions of seafood-hungry nations.

The council ruled in our favor this year, eliminating all foreign fishing from the zone. This means more fish for the U.S. market in 1988, but not in the volumes we could expect if the yen and dollar were closer to parity. With the dollar declining even further from last winter's low, primary processors will send much of what they produce to Japanese markets this year. And with less of their own production to rely on from the Bering Sea, both Japanese and Korean buyers will be clamoring for groundfish from the U.S. zone.

The 1988 cod quota for domestic processors is more than 156,000 metric tons — double the catch of 1987. For pollock, the increase is even more dramatic. More than 721,000 tons are allocated to domestic processors this year — three times what that group caught in 1987.

Cut for joint ventures

Joint-venture operators did not fare as well with pollock — their allocations were cut to 525,000 metric tons, about half of the

Source: International Pacific Halibut Commission.

1987 Halibut Landings by Area

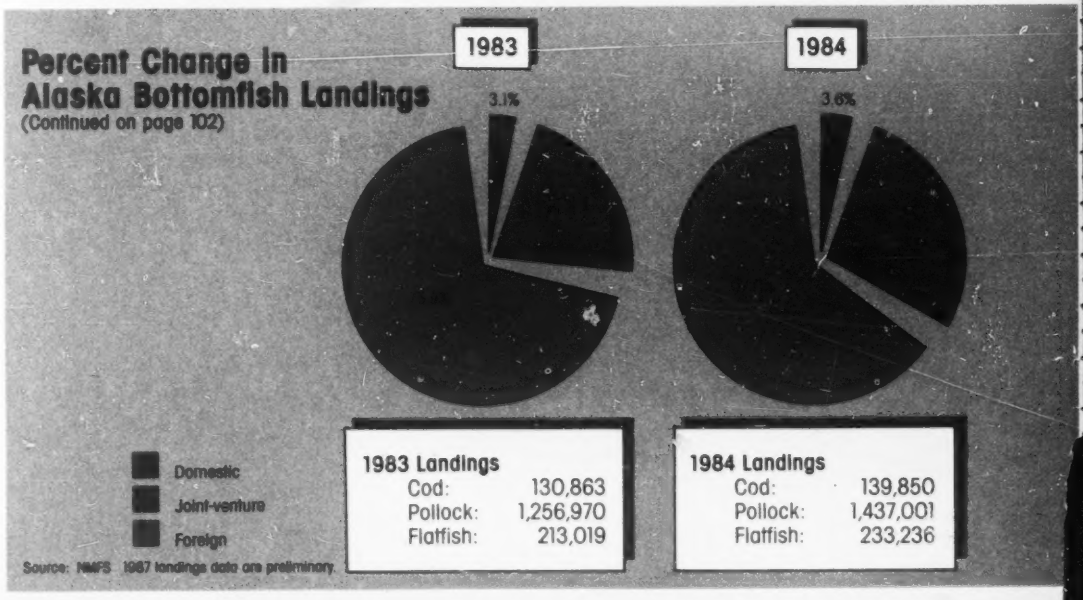
(MILLIONS OF POUNDS)

Almost half of the total 1987 halibut catch of 68.2 million pounds was caught in area 3A.

tonnage landed in 1987. Cod quotas for the J/V fleet were increased to 82,600 mt — a 40 percent increase over '87 landings. Yellowfin sole quotas also jumped — 9,000 mt over '87 landings, to 190,000 mt. Overall, however, joint ventures will bite the bullet on groundfish allocations this year, with a 33 percent drop from last year's landings. Their customers, foreign at-sea processors, will likely move to international waters (see story, page 105) or become importers of U.S.-processed groundfish.

Indeed, much of the additional pollock caught by U.S. vessels will go into surimi blocks, the raw material from which imitation crab and other analog products are made. The analog industry has grown tremendously in this country, but the majority of U.S. produced surimi probably will be sold to Japan next year.

Pollock blocks and shatterpacks are a different story. Over the past two years, Alaska suppliers have positioned pollock successfully in the U.S. as a high-quality substitute for cod. Their marketing has paid off in record-high



prices and loyal customers. But increased imports of Argentine whiting and Korean pollock, combined with good catches off the Alaska coast, broke the rise in prices for pollock last fall.

Inventories of pollock fillets, combined with saithe, topped 21 million pounds at the end of 1987, more than four times the pollock and saithe in cold storage at the end of 1986. Prices are on the down side of a fluctuating cycle that saw levels this low — 80 to 90 cents for 3-to-5 ounce fillets — three years ago.

Time to expand

If ever there was a time to expand the traditional high-volume retail and foodservice markets for pollock, 1988 is it. Buyers want whitefish, but prices on cod, haddock, and whiting fillets have not dropped as dramatically and are still twice the price of frozen-at-sea pollock fillets.

Most of what was in cold storage at the first of the year was small (1-to-4-ounce) fillets. This is not the preferred size for restaurant chains such as Skipper's, which continues to buy large volumes of pollock from the Alaska factory-trawler fleet. But it works well for breaders and for institutional feeders looking for white-fleshed fish at lower-than-cod prices. For many East Coast purveyors, the word on pollock's buying appeal was not out in late January, but with Lenten promotions and trade show presentations throughout the first quarter, the secret won't be kept long.

Once prices for pollock stabilize, little or no change is expected through the summer.

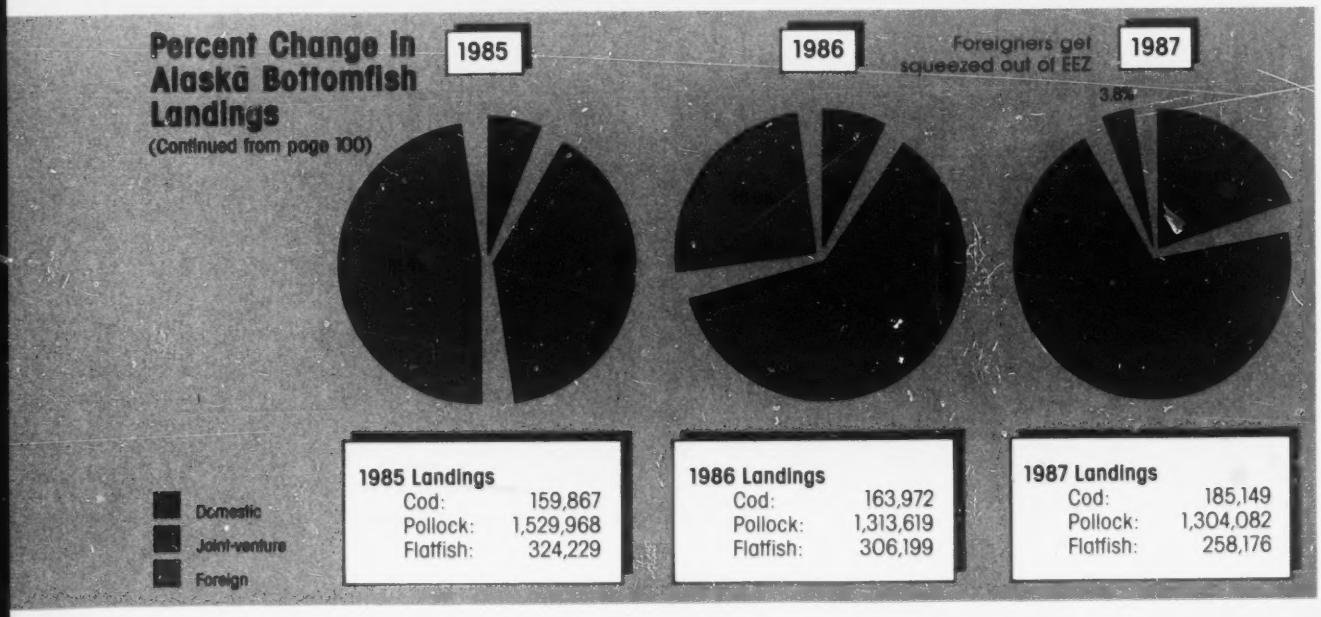
Cod, halibut down

Prices on frozen-at-sea cod dropped in the last quarter of 1987 and were weak in late January, but didn't show the fluctuations seen in the prices of pollock shatterpacks and IQFs. There were no shortages of cod at the beginning of the year. U.S. cold-storage holdings (with no distinction made among West Coast, East Coast, and imported cod) were reported to be 27 million pounds of fillets and 24 million pounds of blocks at the beginning of the year — more than double the inventories of 24 million pounds a year earlier.

Supplies of halibut at the beginning of the year were also up, and it was no surprise that prices were weak on all product forms. At 2 million pounds, January 1 inventories of halibut steaks were half a million pounds higher than they were one year earlier. There were 17.8 million pounds of dressed fish in the freezer at the beginning of this year, up from 1987's 15.2 million pounds.

Halibut prices have also been hurt by the general softening of all whitefish prices at the end of '87 and early in '88.

The International Pacific Halibut Commission met in late January and set a total allowable catch of 74 million pounds, 8 percent higher than last year. The commission will be more flexible this year in setting fishing periods. Specifically, fishing periods in June may be eliminated to insure fishing in August or September. The first halibut period will be May 6–14, with later periods following: late May, late June, early September, and early and mid October. □



The Donut Hole: Who's Catching What?

The Donut Hole, a 4,500-square-mile hexagon in the middle of the Bering Sea, between the U.S. and the U.S.S.R., is at the center of a growing controversy about U.S. and foreign fishing. Because it lies beyond the territorial jurisdiction of both countries, it has been the gathering place for foreign trawlers as they've been squeezed out of the U.S. zone.

But are those foreign trawlers fishing there? Or are they, as many industry observers suspect, sneaking over the line to fish illegally in U.S. waters? Based on documents submitted by foreign nations (primarily Japan and Korea) to the North Pacific Fisheries Management Council, pollock catches in the Donut Hole grew from 4,200 metric tons in 1982 to 993,000 mt in 1986. But there is little accountability in these figures, and little data on where the catch occurs.

Too deep

Much of the area within the Donut Hole is very deep, and considered unsuitable for fishing. On the eastern edge of the Bering Sea, pollock tend to school in areas above the continental shelf, but scientists say pollock in the Donut Hole have been found way down in the water column.

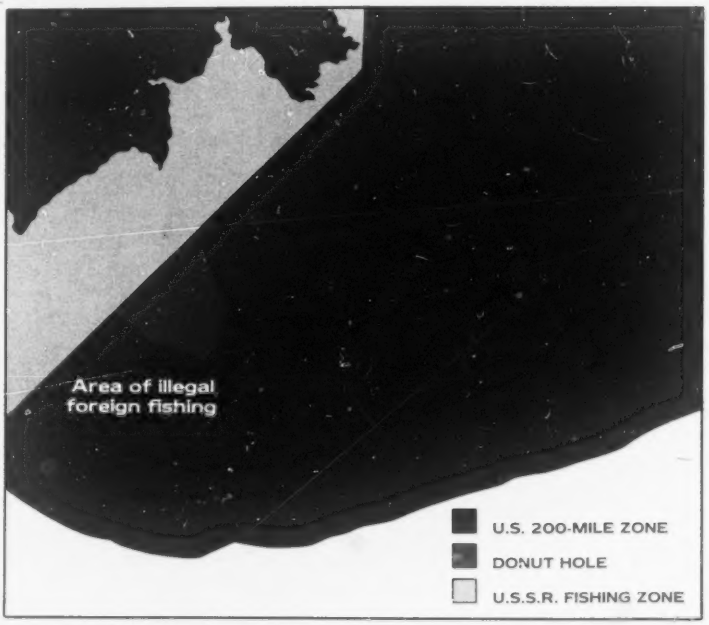
A recent industry study looking at the transshipment of groundfish to foreign trampers in the area revealed a volume of seafood far greater than that accounted for in NPFMC landing figures.

But Bob McVey, director of the National Marine Fisheries Service Alaska region, says that just because the seafood is transshipped in the Bering Sea, it doesn't mean it was caught there. Furthermore, because of the nature of the reporting system, there could be a high degree of duplication, with two documents reporting the same cargo.

Crossing the line

Even if the figures are off, however, it is clear that there are discrepancies in actual versus reported landings. With productive fishing grounds just outside the Donut Hole, it is also likely that foreign vessels are crossing the line — perhaps under cover of clouds or darkness, when air surveillance is useless — to take our fish.

In mid-January, two industry representatives decided to find out for themselves. Ted Evans, executive director of the Alaska Factory Trawlers Association, and Sam Hjelle, owner of a factory trawler, chartered a jet for a supersecret reconnaissance flight over the area. They videotaped seven foreign vessels fishing 39 miles inside the U.S. boundary. Three of the ships were unidentifiable because their hull numbers were being covered as the plane flew over, but the rest were Japanese.



Source: North Pacific Fisheries Management Council

The Donut Hole is the free area outside both the U.S. 200-mile fishing limit and the U.S.S.R.'s fishing zone. The water in the Donut Hole is deep, not good for pollock fishing.

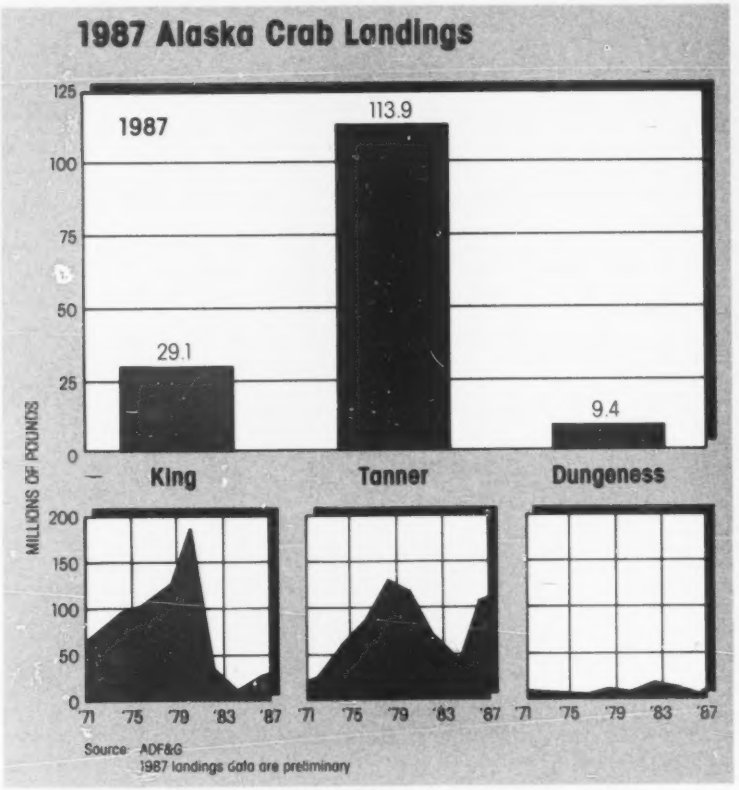
Evans and Hjelle showed the videotape at the NPFMC meeting in Anchorage a week later. The council immediately called for increased Coast Guard surveillance, and a cutter was dispatched to the scene that day. Northwest congressmen have asked for the use of spy satellites to find violators of the U.S. fishing zone. The Navy — which routinely patrols the region for Soviet submarines — was asked to share intelligence data with the council.

What does it mean?

The ramifications of this level of illegal fishing are unclear. If it continues, will groundfish stocks follow the fate of Alaska king crab in the early 1980s, when landings fell dramatically? If the illegal fishing is stopped, will that mean an increase in the quota for domestic harvesters? And if it does, where will that additional product be marketed?

— Bruce Buls and Peggy Parker

Shellfish Stocks Rebound in Alaska and Oregon



Landings up on all species

Landings of Dungeness, king, and tanner crab were on the upswing last year in nearly every West Coast port. In Alaska, it appeared that king crab stocks were finally bouncing back from the disasterous overfishing of the late 1970s.

More than 29 million pounds were landed last year, a healthy 11 percent increase over '86 landings.

Prices for king crab remained fairly firm through most of 1987. There was some easing of prices for split legs early this year, but, with the exception of promotional discounts, buyers should expect prices similar to last year's. That means higher prices in the third quarter than in the first two, when production is greatest.

At these prices ($8–$9 for split legs, depending on size), king crab will be edging lobster tails off the plate in upscale restaurants. With reliable supplies and the advantage of being produced in the U.S., king crab is a real threat to imported tails.

According to Alaska Department of Fish & Game biologists, 1988 landings of red and blue king crab should be just over 16 million pounds. In 1987, another 13 million pounds of brown crab were caught throughout Alaska, primarily in the Adak region. That season opened November 1, and early catch reports are encouraging. More than 2 million pounds of brown kings were landed there through late January.

Bristol Bay kings

Bristol Bay, known for its huge red-salmon run, is gaining fame as a productive

TIM THOMPSON

A pot full of tanner crab. Forecasts for both bairdi *and the smaller* opilio *are up this year.*

red-king-crab fishery as well. Last year 12.3 million pounds of red kings (which have the highest value of the three subspecies) were caught there. More than 13 million pounds are expected to be caught this year.

Last year saw a dramatic jump in king-crab exports to Japan. Because Japanese buyers were on the grounds with cash, willing to pay what were high prices to the U.S. fishermen and processors — the dollar had taken its sharpest tumble against the yen by then — they took 6.4 million pounds of frozen product through October of last year. That compares with 1986 exports of 1.7 million pounds during the same period.

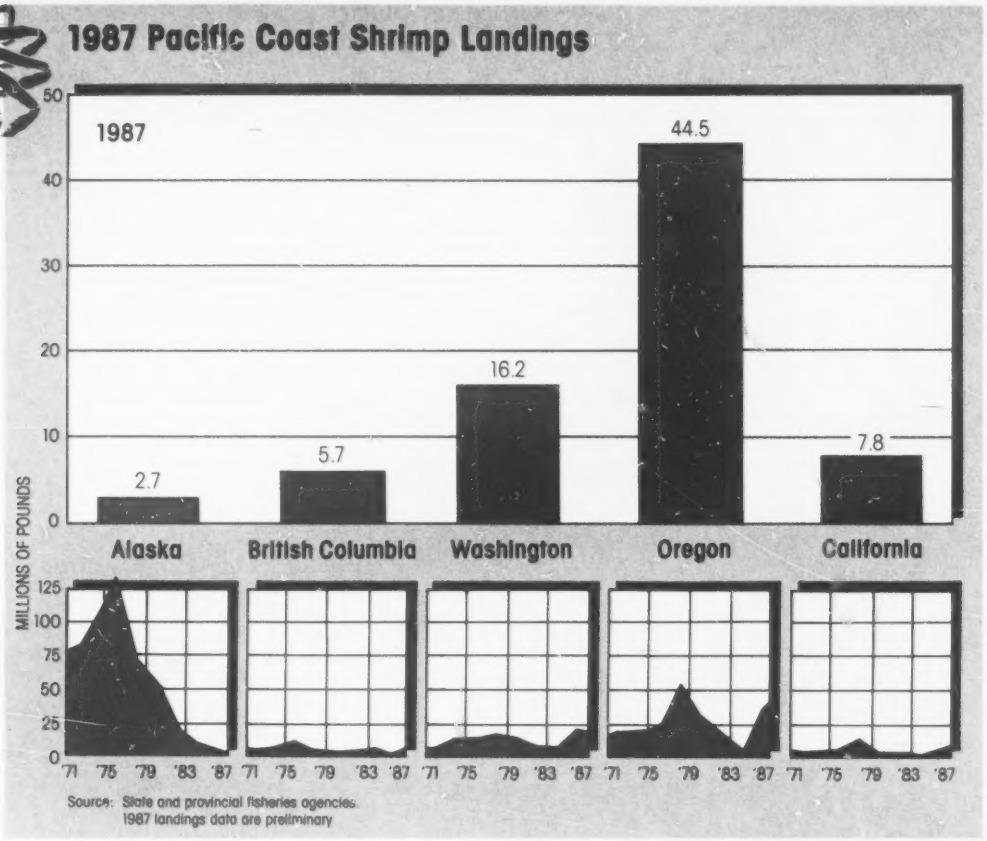
The tanner story

Japanese imports of *opilio*, the smaller of the two tanner-crab subspecies, were a different story. Domestic consumers supported *opilio* prices, and the market broadened as supplies of *bairdi* became scarce. Exports to Japan dropped from 16 million pounds through October 1986 to 9.2 million through October 1987.

Opilio fishermen were on a roll last year. Nearly 102 million pounds of the smaller tanner crab were landed — about double what ADF&G had predicted. Yet the stocks remain strong, and biologists have predicted a harvest of 110.7 million pounds for the Bering Sea fishery this year.

The forecast for *bairdi* has been set at 17.5 million pounds, up significantly from last year's catch of 12 million pounds. Just four years ago, *bairdi* catches outpaced *opilio* by several million pounds. But when the marketing programs for *opilio* got into high gear, demand for the less expensive crab outstripped

1987 Pacific Coast Shrimp Landings



Source: State and provincial fisheries agencies.
1987 landings data are preliminary

Oregon shrimp landings up, Alaska's still slipping

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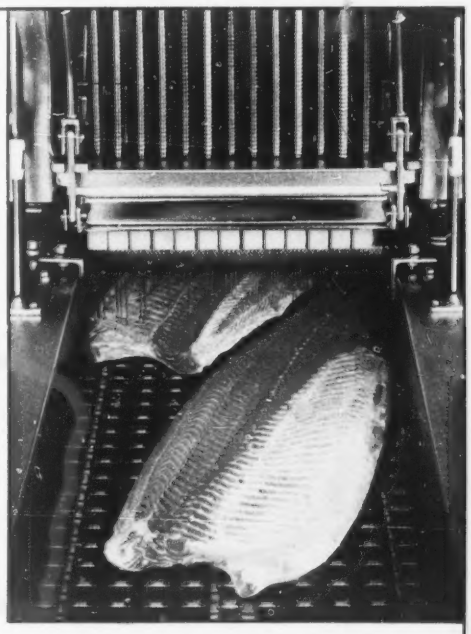

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supply. Historical landings of the two crabs illustrate the response to the market:

YEAR	BAIRDI	OPILIO
	(MILLIONS OF POUNDS)	
1983	36.3	24.8
1984	23.6	26.8
1985	63.5	22.2
1986	95.1	14.9
1987	102.0	11.9

The market for tanner crab (also called snow crab) was strong in 1987 and showed no sign of weakening this year. Prices rose to the $3.50 level for *opilio* clusters late last year, $2 higher than for *bairdi*. Inventories of tanner sections were down in December — 3.9 million pounds, compared with 8 million a year earlier.

Lots of shrimp

If this year's shrimp catches in Oregon follow the trend of the past two seasons, Oregon may again be landing record volumes of cold-water shrimp, *Pandalus jordani*. More than 44.5 million pounds of shrimp were landed there last year, the highest catch since 1978's catch of 56.7 million pounds.

The only dark cloud over this bounty is the number of undersized shrimp caught early in the season. Enforcement agents seized some 300,000 pounds of pinheads (less than 160-count) before mid-May, but most of it ultimately reached the market. It was a strong market, though, and prices rose steadily from $3.25 to $4.25 and $4.50 for large sizes (wholesale FOB West Coast). In June prices peaked, and when some processors began selling below market for cash-flow reasons, the price began a decline that settled in the low $3 range for small sizes, about $4 for large sizes.

Landings on the rest of the West Coast showed little pattern. Alaska catches were down 2 million pounds to 2.7 million; the British Columbia catch was up — 5.7 million pounds, compared with 2.2 million in 1986; Washington landings were down about a million pounds, to 16.2 million; and California landings were up slightly from 1986, to 5.8 million pounds. □

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Circle Reader Inquiry #84

A Banner Year for the Salmon Market

It was Alaska's smallest salmon harvest since 1979, but the market was so strong that, as one major packer put it, "Everyone is smiling this year." There were surprises throughout the year, though. In May, Copper River red and king salmon were bringing record-high wholesale prices — the market was hungry and inventories were down. In June, fishermen set their nets in Bristol Bay knowing that the red-salmon forecast was the lowest in recent memory — 8 million fish, compared with 20 million just a few years ago.

But the 4th of July passed with little evidence that any run was coming, and buyers turned cold. As they started stocking up on other species around Alaska, the Bristol Bay run hit. When it was over, more than 16 million reds had been landed. About this time, another surprise return surged into Cook Inlet, and for a few weeks red salmon were more plentiful than mosquitoes.

Concerned about the strong run of pinks predicted to come in to Southeast, many processors quickly moved their salmon inventory. Then the run didn't show up. Prices, naturally, began a sharp incline.

The numbers

The numbers tell the story: red-salmon landings were 35.4 million fish, 3 million more than the year before, but 4 million *below* the five-year average; the pink salmon catch was 46.1 million fish, more than 30 million fish less than the '86 catch. King, chum, and coho landings were closer to expectations (see graph, page 114), but because overall landings were short, prices for these species rose along with red and pink prices.

Landings in British Columbia were also down for all species, but hardest hit was red salmon — 32.8 million pounds were caught last year, compared with 67 million pounds the year before. (Bear in mind that these are pounds, not individual fish, as are reported in Alaska. For comparison, 159.6 million pounds of red salmon were landed in Alaska last year.)

The total take of salmon in B.C. was 144.8 million pounds, about 65 percent of 1986's catch. This was reflected in the province's canned pack of just over 1 million cases, down sharply from 1.9 million cases in 1986 and 2 million cases in 1985.

TOM AND EDNA MADISON

An Alaska gillnetter. 1987 was a year of surprises for the West Coast salmon industry.

In Washington, landings were down on coho and sockeye, up on king, pink, and chum. Overall landings, however, (39.7 million pounds) were 10 million pounds below 1986's.

Despite a 78 percent increase in the canned pack for reds, the overall salmon pack was down nearly 20 percent, to 2.35 million cases.

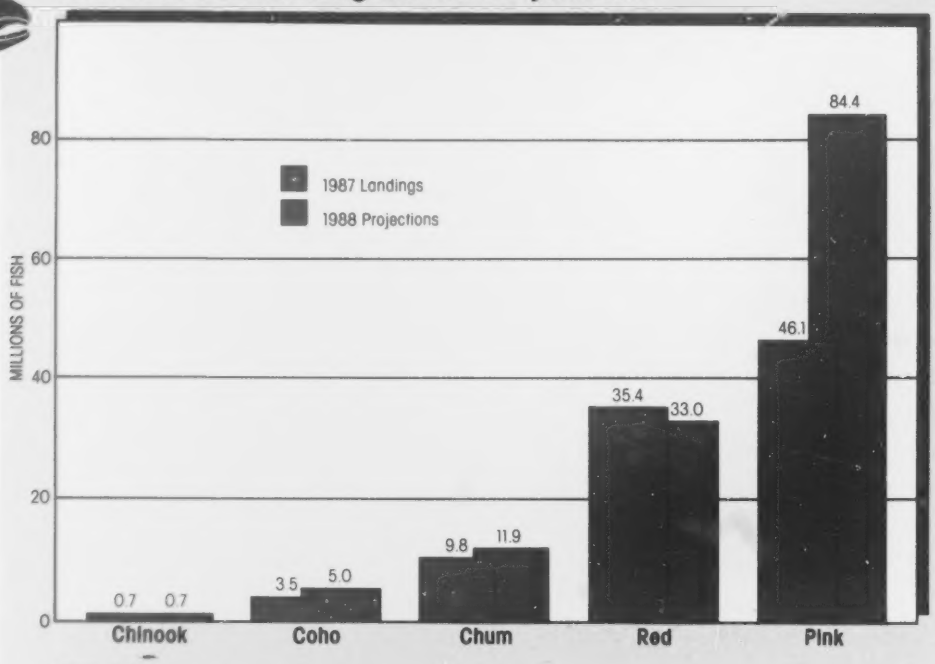
Prices strong

What's all this done to prices? It's no surprise that they are strong. Limited inventories have combined with a very strong pound, yen, and franc to make the export market for salmon more attractive than ever.

A comparison of last November's export prices with prices in November 1986 shows the steepness of the price climb. In November 1986, the average price per pound of canned pinks was $1.49; last November it was $2.57. Through November of '86, nearly 35 million cases had been exported to the United Kingdom and other countries; through November of 1987, just 13.5 million cases had been exported.

Early this year, salmon canners lowered the price of reds slightly. That, combined with Lenten discounts, resulted in lower prices for one-pound tall reds than for one-

1987 Salmon Landings/1988 Projections



Source: ADF&G
1987 landings data are preliminary.

Pink salmon landings to skyrocket in'88

Total 1987 landings: 95.5 million fish

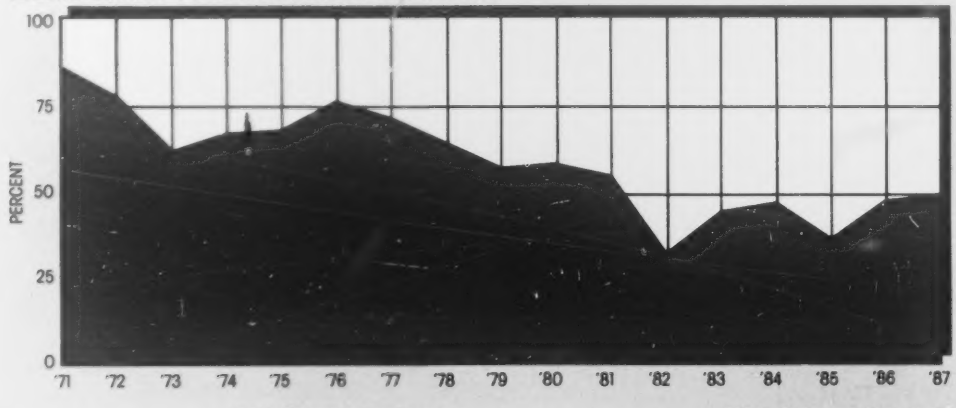
Projected 1988 landings: 134.9 million fish

pound tall pinks. In late January, list price for pinks remained firm at $53 for 24 one-pound talls.

Exports down

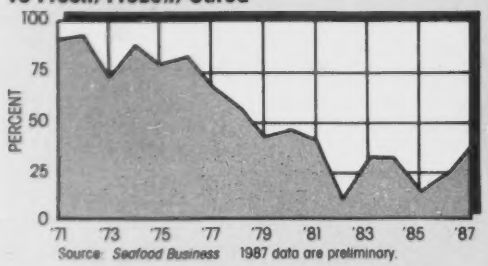
Frozen exports also showed a marked decline in volume, but strong gains in value. Through November 1987, just 39.5 million pounds of chum had been exported, compared with 44 million pounds a year earlier. Coho exports showed a similar decline — 23.6 million to 20.3. The average export price for cohos doubled in that time, however. Total exports of frozen reds through

Alaska Salmon Canned vs Fresh/Frozen/Cured



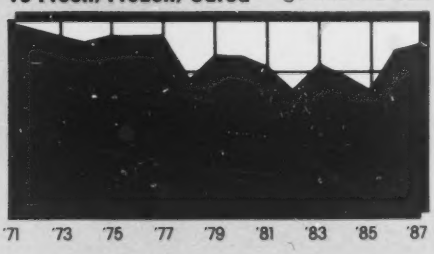
Percent of salmon in the can still below 10-year average

Red Salmon Canned vs Fresh/Frozen/Cured



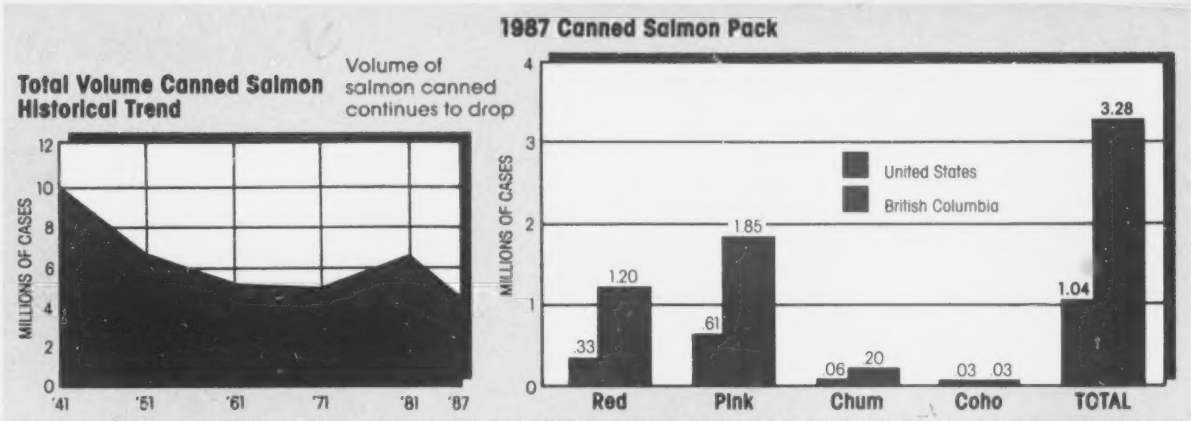
The trend away from canning reds continues

Pink Salmon Canned vs Fresh/Frozen/Cured



Most pinks still go into the can

Source: *Seafood Business* 1987 data are preliminary.



Source: National Food Processors Association, B.C. Ministry of Agriculture and Fisheries 1987 data are preliminary. U.S. companies packed 3,052 cases of king salmon, Canadians packed 3,809.

November were a similar story: 137.5 million pounds, compared with 143.6 million a year earlier. Prices jumped 90 cents to $3.40 a pound.

Reduced holdings

Inventories at the end of the year showed dramatically reduced holdings on all species except king salmon, which was up slightly to 3.4 million pounds. There were 1.8 million pounds of pinks in cold storage, compared with 2.7 million a year earlier. Sockeye, or red salmon, logged in at 1.7 million pounds, compared with 4.4 million in December 1986. Even the ubiquitous chum salmon was scarce — 12.8 million pounds in storage compared with 21.4 million a year earlier.

Predictions high

Alaska Department of Fish and Game biologists predict a catch of 135 million salmon this year. This includes a Bristol Bay red forecast of 18.6 million and a projected pink-salmon catch in Southeast of 42 million fish. If the predictions are true, 1988 will show the second highest catch on record, just 10 million fish below 1985's phenomenal catch of 144.5 million fish.

Regardless of the final number, the first fish landed this spring will enter a salmon-starved market. Prices are likely to stay strong through 1988. □

U.S. packers outstrip Canadian for canned salmon

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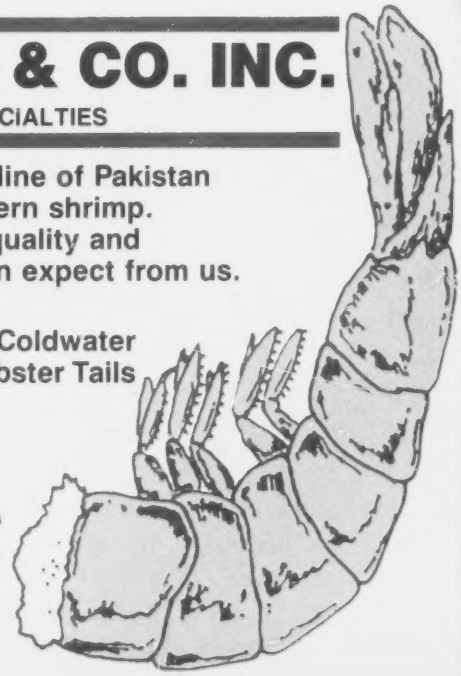

Circle Reader Inquiry #53

1988 Pacific Packers

(POUNDS OF WHOLE

	HALIBUT	BLACKCOD	PACIFIC COD	POLLOCK	ROCKFISH	FLATFISH	ROE HERRING	FROZEN SALMON	FRESH SALMON
								2,012,576	
	103,867	37,945			33,083		1,003,200	1,955,057	
		5,000,000	50,000,000	40,000,000	6,000,000	20,000,000			
	545,955	507,218	86,233		30,638			3,143,000	150,000
	932,066	37,154	1,114,452	1,008				12,926,270	209,817
	228,943	207,454	152,389		38,125			4,950,120	146,933
							377,500	4,354,000	25,100
	760,206		331,646		1,052			3,042,874	
									1,016,398
								250,000	250,000
	4,247				29,449				7,807
			524,000	92,281,000		1,903,000			
								2,799,388	
	1,043,000	80,000	7,530,000	3,870,000	40,000	1,450,000		4,700,000	
									5,000
							4,934,600	7,209,152	
	100,000	5,000					100,000	5,700,000	1,200,000
								673,203	
	80,000						500,000	1,400,000	
	723,340	609,572						992,342	
	1,268,582	593,619	9,987				3,367,531	18,488,724	60,020
								2,529,603	88,849
	247,000		202,717					6,229,743	
	50,000						100,000	2,600,000	200,000
	613,137	1,002,008			29,218		530,110	4,306,152	
	500,000	700,000			1,000,000				2,500,000
	2,461,319	4,356,419	191,662		831,700		1,004,690	8,354,714	441,166
								1,127,374	
	10,000								1,000
							1,157,150	3,299,273	344,979
	860,000	286,000	478,000	109,000				425,000	
								800,217	
	2,000,000	1,000,000	2,000,000	600,000	6,000	6,000	2,000,000	5,200,000	10,000
	70,000							6,000,000	1,000,000
	12,601,662	**14,422,389**	**62,621,086**	**136,861,008**	**8,039,265**	**23,359,000**	**15,074,781**	**115,468,782**	**7,657,069**
	200,000							34,000	2,700,000
	100,000	4,000	200,000		75,000	200,000		100,000	500,000
	300,000	**4,000**	**200,000**		**75,000**	**200,000**		**134,000**	**3,200,000**
	1,140,000	1,790,000	10,000	250,000	200,000			1,950,000	100,000
	5,785	2,557							35,734
	243,167	927,413	2,565,872	40,093	18,253,576	4,046,591		1,000,000	2,435,752
	210,000	20,000						270,000	1,410,000
					78,088			4,500	30,920
	9,500							450,000	2,350,000
	100,200								
								1,100,000	700,000
	41,369		4,675,276	12,442,658				141,479	
									604,838
	86,000	61,000	43,000		22,000			1,350,000	1,050,000
	300,000	500,000			3,500,000	1,000,000	3,000,000	1,500,000	300,000
									2,000,000
	2,136,021	**3,300,970**	**7,294,148**	**12,732,751**	**22,053,664**	**5,046,591**	**3,000,000**	**7,765,979**	**11,017,244**
		146,600	851,550		1,515,097	1,206,341			1,015,475
		146,600	**851,550**		**1,515,097**	**1,206,341**			**1,015,475**
					750,000	500,000		55,000	350,000
	92,209				604,131	43,037			
	92,209				**1,354,131**	**543,037**		**55,000**	**350,000**
	15,129,892	**17,873,959**	**70,966,784**	**149,593,759**	**33,037,157**	**30,354,969**	**18,074,781**	**123,423,761**	**23,239,788**

[1] Totals do not include production of salmon roe, scallops, and miscellaneous species
[2] Includes 7,735 lbs. lingcod
[3] Includes 2,726 lbs. lingcod
[4] Includes 120,000 lbs. roe kelp
[5] Includes 3,449 lbs. tuna
[6] Includes 68,120 lbs. roe kelp
[7] Includes 123,200 lbs. roe kelp
[8] Includes 4,250,000 lbs. Pacific whiting; 6,200,000 lbs. Pacific dogfish
[9] Includes 14,763 lbs. albacore tuna; 4,850 lbs. blueback
[10] Includes 110,000 lbs. hake; 1,300,000 lbs. dogfish
[11] Includes 19,500 lbs. swordfish

Company Production Report

LANDED FISH OR SHELLFISH)

	KING CRAB	TANNER CRAB Bairdi	TANNER CRAB Opilio	DUNGENESS CRAB	SHRIMP	CLAMS	OYSTERS	TOTAL[12]	CANNED[17] SALMON
								2,012,878	
								3,140,887	31,312
	800,000		3,000,000					14,800,500	
								4,443,044	244,663
								15,220,787	185,099
								3,723,964	9,093
	2,610,000	265,000	13,788,000					21,410,800	
								4,135,778	22,424
								1,016,396	140,520
								500,000	
					81			44,310	
								94,705,000	
								3,798,338	3,406
		52,000						18,765,000	1,230
						100,000		106,000	
								12,149,782	
								7,105,000	
								573,203	122,373
								2,100,000	
								3,323,284	
	874,067	770,282	2,259,133					27,891,948	219,130
								2,618,482	39,264
	168,000	76,000	478,000					722,000	
								3,879,460	
								2,950,000	
								9,480,825	
				50,000	100,000	150,000		8,000,000	1,900
	19,567	422,627		2,480,088	2,306			20,569,707	
								1,127,374	12,674
					5,000			15,000	
								4,869,522	
	374,000	669,000	49,000	5,000				3,258,000	
								123,200	
								900,217	26,588
	270,000	1,000,000	100,000	150,000				14,342,000	
								7,070,000	
	5,115,634	**3,254,909**	**19,674,133**	**2,685,088**	**107,387**	**250,000**		**227,817,421**	**1,059,676**
					400,000			3,234,000	
				50,000	600,000	200,000	200,000	2,229,000	
				50,000	**1,000,000**	**200,000**	**200,000**	**5,963,000**	
								10,880,000[14]	
				514,060				577,749[15]	143
					3,000,000[16]			32,512,484	
								3,320,000[14]	
				221,753	1,041,968			1,377,228	
								3,308,500	
								100,200	
								1,500,000	
	572,983		240,033					18,133,290[13]	
								804,838	
								2,612,000	
				4,780		97,300	45,000	147,080	
				400,000				10,500,000	6,000
								2,150,000[14]	
							9,350,500	9,350,500	
	572,983		**240,033**	**1,140,593**	**4,041,968**	**97,300**	**9,395,500**	**101,884,868**	**6,143**
				90,273	7,946,508			12,871,844[18]	
				90,273	**7,946,508**			12,871,844	
				500,000				2,159,000	
								10,000[14]	
							240,000	241,000[14]	
					119,950			1,323,395[14]	
				500,000	**119,950**		**240,000**	**3,729,395**	
	5,688,617	**3,254,909**	**19,914,166**	**4,465,954**	**13,215,813**	**547,300**	**9,835,500**	**351,993,725**	**1,065,819**

[12] Includes 150,000 lbs. sturgeon
[13] Includes 80,000 lbs. white sturgeon; 20,000 lbs. green sturgeon
[14] Includes 10,000 lbs. abalone
[15] Includes 1,000 lbs. bay mussels
[16] Includes 418,320 lbs. shark; 45,748 lbs. swordfish

[17] Total volume canned salmon: number of 48-lb. cases or equivalent
Totals do not include production from the following companies:
Alaska Pacific Seafoods, John Cabot Canning Co., Chatham Straight Seafoods, Cook Inlet Packers, Icicle Seafoods, Inlet Packers, Kenai Packers, King Crab, Inc., Kodiak Salmon Packers, North Pacific Processors, Trident Seafoods, Washington Fish & Oyster, and Wrangell Fisheries
Source: *Seafood Business*